

# NOTES



- ✓ Miscellaneous Notes
- ✓ Encounter Notes
- ✓ Group Notes

# Notes

This module allows you to document a variety of notes which serve different purposes. There is a Miscellaneous Notes screen to capture notes documenting phone calls, case management notes, and other non-billable, non-face-to-face contacts. There is an Encounters sub-module used to document client/counselor face-to-face encounters and notes regarding services provided. The Group Notes module is used to quickly and easily document therapy contacts for a group of clients.

1. To access the **Notes** module, go the **Activity List** menu and then click the **Notes** menu item.
2. This will bring you to the **Notes List** which shows all previously entered **Miscellaneous** and **Encounter Notes**.
3. Clicking the **Review** hyperlink for the note you wish to see will bring up the first screen of the note chosen.

The screenshot displays the WITS I-SMART software interface. The top header shows the user as Cleland, Lonnie, and the location as Iowa Dept. of Public Health, Test Facility. The date is October 2011.

**Notes List Screen:**

- Notes Search:** Start Date: 12/8/2010, End Date: 12/8/2011. Buttons: Clear, Go.
- Notes List Table:**

Note Type	Date	Duration	Staff	Service/Summary	Actions
Note to file	11/14/2011		Cleland, Lonnie	As the students file out of Ja...	<a href="#">Review</a>
Group Notes	4/1/2011	180 Min	Cleland, Lonnie	90853 - Group psychotherapy (o...	<a href="#">Review</a>
24 Hour Service	3/14/2011	8 Days	Cleland, Lonnie	H0018-TF- Primary Residential ...	<a href="#">Review</a>
Group Notes	3/2/2011	3 Days	Gbadamosi, Rufi	90812 - Individual psychothera...	<a href="#">Review</a>
Individual Notes	3/1/2011	60 Days	Cleland, Lonnie	90804 - Individual Psychothera...	<a href="#">Review</a>
Group Notes	2/28/2011	60 Min	Cleland, Lonnie	90853 - Group psychotherapy (o...	<a href="#">Review</a>
Individual Notes	2/25/2011	60 Min	Cleland, Lonnie	90804 - Individual Psychothera...	<a href="#">Review</a>

**Encounter for Client, Testing Screen:**

- Encounter Type:** 1-Individual Notes
- Event Type:** 1-Admission
- Tx ID:** 1497987
- Created Date:** 7/1/2011 7:54 AM
- Service:** 90804 - Individual Psychotherapy - Insight Oriented
- Program Name:** 19-Test Facility/Extended Outpatient : 2/24/2011 -
- Start Date:** 3/1/2011, **End Date:** 3/1/2011
- Service Location:** APT
- Start Time:**, **End Time:**
- Substance Abuse Medication:** 1-Medication Free
- Duration:** 60, **1-Days**
- # of Sessions:** 1
- Rendering Staff:** Cleland, Lonnie
- Primary Payment Src:** 17-Workers Compensation
- Supervising Staff:**
- Other Payment Src:** 10-NA No Other Pay Source
- Referring Phys:**

Buttons: Cancel, Save, Finish

# Notes

## Miscellaneous Notes

- To review an existing **Miscellaneous Note** click on **Review** under the **Actions** column.
- To add a new **Miscellaneous Note** click the **Add New Misc. Notes Record** hyperlink. This will bring you to the screen to enter the details.
- To set an alert related to this **Note** click the **Mark Alert** hyperlink. This will highlight the client's name in red on the **Client List**. To remove the alert click the **Remove Alert** hyperlink.

**WITS I-SMART** User: Cleland, Lonnie  
Loc: Iowa Dept. of Public Health, Test Facility  
Client: Client, Testing | 6711049867 | Case #: 1

October 2011 Logout

Print View

**Notes Search**  
Start Date: 12/8/2010 End Date: 12/8/2011  
Clear Go

**Notes List**

Note Type	Date	Duration	Staff	Service/Summary	Actions
Note to file	11/14/2011		Cleland, Lonnie	As the students file out of Ja...	<a href="#">Review</a>
Group Notes	4/1/2011	180 Min	Cleland, Lonnie	90853 - Group psychotherapy (o...	<a href="#">Review</a>
24 Hour Service	3/14/2011	8 Days	Cleland, Lonnie	H0018-TF- Primary Residential ...	<a href="#">Review</a>
Group Notes	3/2/2011	3 Days	Gbadamosi, Ruffi	90812 - Individual psychothera...	<a href="#">Review</a>
Individual Notes	3/1/2011	60 Days	Cleland, Lonnie	90804 - Individual Psychothera...	<a href="#">Review</a>
Group Notes	2/28/2011	60 Min	Cleland, Lonnie	90853 - Group psychotherapy (o...	<a href="#">Review</a>
Individual Notes	2/25/2011	60 Min	Cleland, Lonnie	90804 - Individual Psychothera...	<a href="#">Review</a>

[Add New Misc. Note](#)  
[Add New Encounter Note](#)  
[Print Notes](#)

**WITS I-SMART** User: Cleland, Lonnie  
Loc: Iowa Dept. of Public Health, Test Facility  
Client: Client, Testing | 6711049867 | Case #: 1

October 2011 Logout

Print Report Print View

**Miscellaneous Notes for Client, Testing**

Author Name: Cleland, Lonnie  
Author Title:  
Created Date:

Note Type: [Dropdown] Service Date: 12/8/2011 Duration: [Dropdown]  
Program: [Dropdown] Start Time: [Text] Alert: No [Mark Alert](#)  
Frequency: [Text] End Time: [Text] Was Report Sent to State: [Text]

Summary: [Text Area]  
Signed Notes: [Text Area]  
Unsigned Notes: [Text Area]

Release these notes? No [Cancel](#) [Save](#) [Finish](#)

[Add Note](#) [Sign Note](#)

# Notes

## Miscellaneous Notes

- Select the **Note Type** from the drop-down. The **Date** will pre-populate with the current date. This can be changed as needed. Enter the **Start Time**, **End Time**, and **Duration**, if desired.
- Write a one line **Summary** in the appropriate text box. This summary will be shown On the **Notes List** screen.
- Write the detailed note in the **Unsigned Notes** text box. There is unlimited space to type in this box. When done, click the **Signed Notes** button to move the note into the **Signed Notes** text box. Click **Save** and/or **Finish** when you are done to save the information.

**WITS I-SMART** User: Cleland, Lonnie  
 Loc: Iowa Dept. of Public Health, Test Facility  
 Client: Client, Testing | 6711049867 | Case #: 1

October 2011

Print Report Print View Logout

### Miscellaneous Notes for Client, Testing

Author Name: Cleland, Lonnie  
 Author Title:  
 Created Date:

Note Type: **Note to file** Service Date: **12/8/2011** Duration:

Program:  Start Time:  Alert: **No** [Mark Alert](#)

Frequency:  End Time:  Was Report Sent to State:

Summary: **Client phone call**

Signed Notes

Unsigned Notes

Release these notes? **No** [Delete](#) [Cancel](#) [Save](#) [Finish](#)

[Add Note](#) [Sign Note](#)

# Notes

## Miscellaneous Notes

10. **Finish** will take you back to the **Miscellaneous Notes List** where you will see the note you just entered listed.
11. To review an existing **Miscellaneous Note** click on **Review** under the Actions column.

User: Cleland, Lonnie  
Loc: Iowa Dept. of Public Health, Test Facility  
Client: Client, Testing | 6711049867 | Case #: 1

Print View

October 2011

MedlinePlus

Logout

Home Page

Agency ▶

Group List ▶

Client List ▼

Client Profile ▶

Linked Consents

Non-Episode Contact

Activity List ▼

Intake

Wait List

Treatment Team

Assessments ▶

Crisis and Placement ▶

Admission ▶

Program Enroll

Notes ▼

Misc. Notes

Encounters ▶

### Miscellaneous Notes Search

Start Date  End Date

### Miscellaneous Notes List

[Add New Miscellaneous Notes Record](#)

Service Date	Author	Note Type	Summary	Actions
12/8/2011	Cleland, Lonnie	Note to file	Client called to cancel appoin...	<a href="#">Review</a>
12/8/2011	Cleland, Lonnie	Note to file	Client phone call	<a href="#">Review</a>
11/14/2011	Cleland, Lonnie	Note to file	As the students file out of Ja...	<a href="#">Review</a>

# Notes

## Encounters

- The Encounter Notes sub-module is where you document the details of the face-to-face services provided a client.
- Clicking on **Encounters** in the left-hand menu brings up the **Encounter Search and List** screen.
- Had you clicked **Notes** on the left-hand menu, you would have brought up the **Notes Search and List** screen. This lists both **Misc. Notes** and **Encounters**. Notice you can add either a **New Misc. Note** or **Add New Billable Note** from this screen. **Add New Billable Note** and **Add Encounter Record** are the same thing.
- If you are at the **Encounter** screen, you can either select an **Encounter** listed on the screen by clicking the **Review** hyperlink, or choose to **Add Encounter Record** to add a new record.
- Selecting **Add Encounter Record** opens the **Encounter Profile** screen.

**WITS I-SMART** User: Cleland, Lonnie  
Loc: Iowa Dept. of Public Health, Test Facility  
Client: Client, Testing | 6711049867 | Case #: 1

Print Report Print View

October 2011 Logout

**Encounter Search**

Start Date:  End Date:   
 Rendering Staff:  Service:   
 Encounter Status:  Program:

Clear Go

**Encounter List(Export)**

Tx ID	Start Date	Service	Duration	Session	Rendering Staff	Program Name	Status	Actions
1506897	4/1/2011	90853 - Group psychotherapy (other than multi-family group)	180	2	Cleland, Lonnie	Extended Outpatient	Not Released	<a href="#">Review</a>
1497990	3/14/2011	H0018-TF- Primary Residential Treatment	8	8	Cleland, Lonnie	Extended Outpatient	Not Released	<a href="#">Review</a>
1508416	3/2/2011	90812 - Individual psychotherapy, interactive, using play equipment, physical devices, language interpreter, or other mechanisms of non-verbal communication, in an office or outpatient facility, approx. 45 to 50 min. face-to-face	3	1	Gbadamosi, Rufi	Extended Outpatient	Not Released	<a href="#">Review</a>
1497987	3/1/2011	90804 - Individual Psychotherapy - Insight Oriented	60	1	Cleland, Lonnie	Extended Outpatient	Not Released	<a href="#">Review</a>

[Add New Encounter Record](#)

**Notes Search**

Start Date:  End Date:

Clear Go

**Notes List**

Note Type	Date	Duration	Staff	Service/Summary	Actions
Note to file	12/8/2011		Cleland, Lonnie	Client called to cancel appoin...	<a href="#">Review</a>
Note to file	12/8/2011		Cleland, Lonnie	Client phone call	<a href="#">Review</a>
Note to file	11/14/2011		Cleland, Lonnie	As the students file out of Ja...	<a href="#">Review</a>
Group Notes	4/1/2011	180 Min	Cleland, Lonnie	90853 - Group psychotherapy (o...	<a href="#">Review</a>
24 Hour Service	3/14/2011	8 Days	Cleland, Lonnie	H0018-TF- Primary Residential ...	<a href="#">Review</a>
Group Notes	3/2/2011	3 Days	Gbadamosi, Rufi	90812 - Individual psychothera...	<a href="#">Review</a>
Individual Notes	3/1/2011	60 Days	Cleland, Lonnie	90804 - Individual Psychothera...	<a href="#">Review</a>
Group Notes	2/28/2011	60 Min	Cleland, Lonnie	90853 - Group psychotherapy (o...	<a href="#">Review</a>
Individual Notes	2/25/2011	60 Min	Cleland, Lonnie	90804 - Individual Psychothera...	<a href="#">Review</a>

[Add New Misc. Note](#)  
[Add New Encounter Note](#)  
[Print Notes](#)

# Notes

## Encounters

17. Select **Encounter Type** and from the drop-down box. Face-to-face encounter types are either **Individual**, **Group** or **Family** session. **24 Hour Service** type is used to document services specific to agencies that treat clients on an inpatient or residential basis.
18. **Event Type:** This box is used to document whether the client is being seen for a service as an admitted client, a placement screening or a crisis contact.
19. **Service:** Select the specific service being delivered. The codes are listed in numerical order as they are CPT billing codes.
20. Select the options for **Program Name** and **Service Location**. **Program Name** will pre-populate with the name of the program in which the client is enrolled.
21. **Substance Abuse Medication:** Most clients are Medication Free. If a client is taking a medication used to inhibit substance use, to detoxify or used as maintenance such as Methadone, select the appropriate response. **Note:** This field is not to be used to document psychotropic medications.
22. **TX Start Date / TX End Date:** Used to capture the span of time during which sessions were provided. For a single session encounter, the **TX Start Date** and **TX End Date** will be the same.



# Notes

## Encounters

23. **Rendering Staff** information comes pre-filled based on your login. It can be changed if the person who delivered the service was different from the person documenting it.
24. **Duration:** Duration may be entered in either Minutes (Min) or Days. **Individual, Group** and **Family** sessions must be entered in Minutes. **24 Hour Services** must be entered in Days.  
**Note:** For Outpatient levels of care (Level II.5 or lower) the **Encounter End Date will be the same as the Encounter Start Date.**  
For Residential levels of care (Level III.1 or Higher) as date range may be used to enter per diem services.
24. **# of Sessions:** Number of sessions being documented.
25. **Primary Payment Src / Other Payment Src:**  
**Primary Payment Src** will autofill with information entered in the **Admission** module. **Other Payment Src** will be blank on the first encounter. Thereafter it will autofill with whatever choice was entered in the previous encounter. Should payment sources for a client change over the course of treatment, changing them on the **Encounter Profile** screen will allow the agency to track this change over time by using the **Reports** module **Encounter Data** report.
26. Next will take the user to the **Encounter Notes** screen.

User: Cleland, Lonnie  
Loc: Iowa Dept. of Public Health, Test Facility  
Client: Client, Testing | 6711049867 | Case #: 1

October 2011  
Print Report Print View  
MedlinePlus  
Logout

### Encounter for Client, Testing

Encounter Type: 1-Individual Notes Event Type: 1-Admission  
Tx ID: 1497987 Created Date: 7/11/2011 7:54 AM  
Service: 90804 - Individual Psychotherapy - Insight Oriented  
Program Name: 19-Test Facility/Extended Outpatient : 2/24/2011 -  
Start Date: 3/1/2011 End Date: 3/1/2011  
Service Location: APT Start Time: End Time:  
Substance Abuse: 1-Medication Free Duration: 60 1-Days  
# of Sessions: 1  
Rendering Staff: Cleland, Lonnie Primary Payment Src: 17-Workers Compensation  
Supervising Staff: Other Payment Src: 10-NA No Other Pay Source  
Referring Phys:  
Cancel Save Finish



# Notes

## Encounters

27. On the **Encounter Notes** screen you can select the **Goals** and **Objectives** from the treatment plan that were addressed in this session.
28. To add a **Goal** or **Objective** click the **Add Goals** or **Add Objectives** hyperlink. You can select the relevant goals or objectives by clicking the box to the left of the appropriate goal or objective. Click **Finish** to return to the **Notes** screen. The goals or objectives you selected will be listed under the **Associated Goals** or **Associated Objectives**.

**Note:** You can delete the **Goals** or **Objectives** from the **Encounter Note** by using the **Delete** hyperlinks.

The screenshots show the I-SMART Training web application interface. The top screenshot displays the 'Encounter Notes for Example, Data' screen with sections for 'Associated Goals' and 'Associated Objectives'. The middle screenshot shows the 'Select Goals' screen with a table of goals. The bottom screenshot shows the 'Select Objectives' screen with a table of objectives.

Version #	Plan Dates	Goal #	Goal
<input type="checkbox"/> 1	12/5/2012 - 12/5/2012	1.1	Increase commitment to change and compliance with treatment regime.
<input type="checkbox"/> 1	12/5/2012 - 12/5/2012	2.1	Develop skills to manage anger in a healthy way.

Version #	Plan Dates	Obj #	Objective	Comment
<input type="checkbox"/> 2	12/5/2012 -	1.1.1	Discuss stages of change model	
<input type="checkbox"/> 2	12/5/2012 -	1.2.1	Discuss stages of change model	
<input type="checkbox"/> 2	12/5/2012 -	3.1.1	Verbalize an understanding of the medical problem and the need for medical management.	
<input type="checkbox"/> 2	12/5/2012 -	3.2.1	Write a personal recovery plan that includes compliance with recommended medical treatment and medications.	

# Notes

## Encounters

29. Write a detailed **Narrative** in the **Unsigned Notes** text box provided.
30. Click **Sign Notes** go move the narrative to the Signed Notes text box.
31. **Next** will take you to the **Ancillary Services** screen. The **Ancillary Services** screen allows you to document ancillary services and substance use inhibiting medications rendered to the client during the period covered by the dates you entered on the **Encounter Profile** screen.
32. **Ancillary Services Rendered:** Select the applicable ancillary services in the this box. You may hold the Ctrl key down to make multiple selections at the same time. When you select the item, its background will turn dark. After selecting all the appropriate services click the right pointing arrow for the **Services** to move to the **Services Rendered** box. To unselect a service click on it in the **Services Rendered** box and click the left pointing arrow.
33. **Medications:** Select the medications as applicable in the left hand box. Then select the frequency from the drop-down box in the middle. After that click the right pointing arrow for the **Medications** to move to the **Medications Rendered** box on the right. To unselect a medication click on it in the **Medications Rendered** box and click the left pointing arrow.
34. Click **Finish**.

**Encounter Notes for Example, Data**

Goal Progress: [Dropdown]

Goal #	Goal	Description	Actions
1.1	Increase commitment to change and compliance with treatment regime.		Delete
2.1	Develop skills to manage anger in a healthy way.		Delete
1.1	Increase commitment to change and compliance with treatment regime.		Delete
2.1	Develop skills to manage anger in a healthy way.		Delete
3.1	Understand the relationship between medical issues and substance abuse.		Delete
1.2	Increase commitment to change and compliance with treatment regime.		Delete
3.2	Reduce medical issue's influence on relapse potential.		Delete

Obj#	Objective	Description	Actions
1.1.1	Discuss stages of change model		Delete

Signed Notes: Signed by Schaller, Elizabeth, 12/5/2012 11:44:59 AM

**Ancillary Services Rendered for Example, Data**

TX Start Date: 12/5/2012  
TX End Date: 12/5/2012

**Ancillary Services**

- Child Care
- Educational
- Financial Counseling
- Gambling

**Ancillary Services Rendered**

None

**Medications**

- Antibuse
- LAAM
- Methadone
- Naltrexone
- Other

**Medications Rendered**

None (None)

Frequency: [Dropdown]

Cancel Save Finish

# Notes

## Group Notes

The Group Notes module allows you to manage group therapy sessions and encounters in one location. The user can create group therapy session notes, transfer them to each client's individual file, and create encounters to document services. The Group Notes module is a stand alone module because it is not associated with any one client's file.

35. **Group List:** The **Group List** module enables the user to set up treatment groups and to then document each client's participation in any or all listed groups.
36. There are two headings under **Group List**: 1. **Session List** and 2. **Group Type**.
37. **Group Type:** The **Group Type** module requires the user to set up and maintain a list of various types of groups that the agency's facilities are running at any one time. This must be done in order to set up a specific group. Each of the Group Types that are set up will be added to the **Group Type** drop down on the **Group Profile** screen.
38. Click the **Add Group Type** hyperlink. This opens the Group Type Description, Dates and Sort Order fields for editing.
39. **Finish** adds the Group Description to the **Group Type** list. Each facility can have its own list of Group Types. For example agencies might choose to create groups such as Intensive Outpatient, Extended Outpatient, Relapse and so forth. Then, you can add groups of any name within each of these categories.

The screenshots illustrate the I-SMART Training web application interface for managing Group Types. The top two screenshots show the 'Group Type' list with columns for Description, Created Date, Effective Date, Expiration Date, Sort Order, and Actions. The bottom screenshot shows the 'Add Group Type' form with fields for Unit, Description, Effective Date, Expiration Date, and Sort Order, along with 'Cancel', 'Save', and 'Finish' buttons.

Description	Created Date	Effective Date	Expiration Date	Sort Order	Actions
Fix	8/27/2008	8/1/2008		2	Edit   Remove
Farm 1	8/27/2008			5	Edit   Remove
Shenandoah	12/5/2008			1	Edit   Remove
NCF/PCD	7/1/2009			4	Edit   Remove
Newton CF	9/27/2010				Edit   Remove
Red Oak group	7/18/2011				Edit   Remove
IOP	7/18/2011			1	Edit   Remove
EOP	7/18/2011			2	Edit   Remove
iop	8/25/2011				Edit   Remove
Billie's Group	11/8/2011	1/1/2011			Edit   Remove
Test	12/5/2012	12/1/2012			Edit   Remove

**Add Group Type**

Unit: Test Facility

Description: Test

Effective Date: 12/1/2012

Expiration Date:

Sort Order:

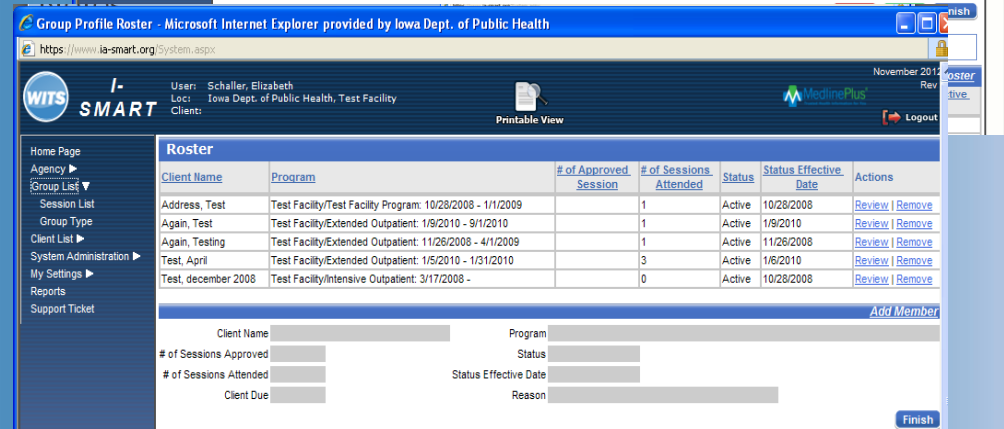
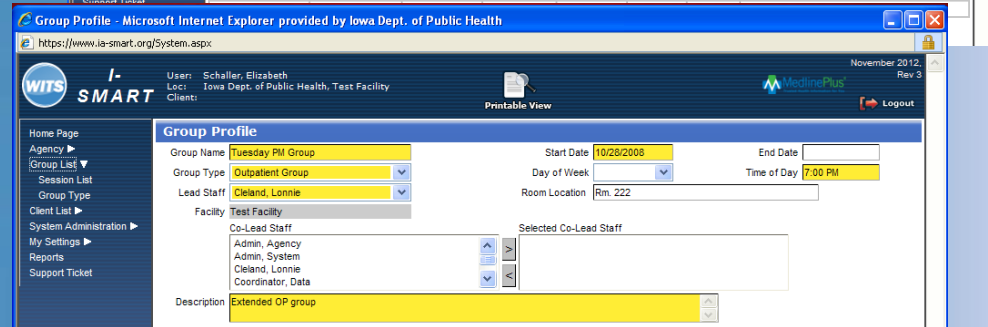
Cancel Save Finish

# Notes

## Group Notes

The **Group Profile List** shows all groups active in the agency.

40. Notice the Jason Test Group is the **Group Name** while its **Group Type** is Relapse Prevention. Relapse Prevention was one of the **Group Types** that was set up in the **Group Type** sub-module. **Review** will open each group's profile for editing. **Delete** will delete a particular group from the **Group List**. **Session List** opens the list of documented sessions for this particular group.
41. **Create Group Session**: Opens the **Group Session Notes** screen to document a group session.
42. **Edit Roster**: This will open the **Roster** screen. **Add Member** will allow you to add any client to the roster. **Review** opens existing roster members for edit. **Remove** will remove clients from this list. Finish returns the user to the **Group Profile** screen.



# Notes

## Group Notes

43. The **Group Session Notes** screen documents the type of note, date, time, and location of the group. It is used to create the group's actual session note, begin the creation process for **Encounters** and to document group member's participation.
44. Entering text in the **Note** box will update each of the selected clients' individual files with the Group Note when **Finish** is clicked.
45. **Mark as Present**, **Mark as No Show**, **Mark as Excused** all update the group roster for those clients checked in the **Client Name** column.
46. **Review**: Opens the **Individual Notes** screen. Entering text in the notes box and clicking Finish will update the client's individual file when an **Encounter** is created. **Finish** return user to the **Group Session Notes** screen.
47. **Note**: If a client is missing from the group's Attendee list choose **Add Attendee**. This will open the **Individual Notes** screen where you can manually add a client's name and Individual note. The **Client Name** drop down will contain the names of all clients on the group roster that are not listed on the **Attendee List**. If the client's name is not present, you will have to add the client to the group roster by returning to the **Group Profile** screen to **Edit Roster**. See # 38 above.

Group Session Profile - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://www.ia-smart.org/System.aspx

User: Schaller, Elizabeth  
Loc: Iowa Dept. of Public Health, Test Facility  
Client:

Printable View

November 2012, Rev 3

Logout

**Group Session Notes**

Group Name: Tuesday PM Group  
Group Type: Outpatient Group  
Note Type: 2-Group Notes  
Date: 12/10/2012  
Bilable: Yes  
Start Time: 7:00 PM  
End Time:  
Lead Staff: Jones, Julie  
Duration:  
Duration Type:  
Location: Office  
Service: 90853-Group psychotherapy (other than multi-family group)  
Co-Lead Staff:  
Admin, Agency  
Admin, System  
Cleveland, Lonnie  
Coordinator, Data  
Selected Co-Lead Staff:  
Note: Demonstrating Group Note

Cancel Save Finish

**Attendees**

Add Attendee Mark as Present Mark as No Show Mark as Excused

Client Name	# Attnd	Status	Individual Note Summary	Actions	Misc. Notes	Encounter
Address, Test	1			Review   Delete		
Again, Test	1			Review   Delete		

Group Session Note - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://www.ia-smart.org/System.aspx

User: Schaller, Elizabeth  
Loc: Iowa Dept. of Public Health, Test Facility  
Client:

Printable View

November 2012, Rev 3

Logout

**Individual Notes**

Client Name: Address, Test  
Delivered Service: 90853-Group psychotherapy (other than multi-family group)  
# of Sessions Attended: 1  
Billed?: No  
Status:  
Individual Note: Test is doing well

Cancel Finish



# Notes

## Group Notes

48. Notice the **Create** hyperlinks under **Misc. Notes** and **Encounters** column headings. Choosing the **Create** link under **Encounter** will open the chosen client's **Notes/Encounter** module to document the group session in the client file. Up until this point, the session has only been documented in the Group Notes module.
49. Notice that significant portions of the **Encounter** including **Start Date** and **End Date** have been autofilled by the system. Complete the rest of the screen. **Next** moves you on to the **Encounter Notes** screen.

Group Session Profile - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://www.ia-smart.org/System.aspx

User: Schaller, Elizabeth  
Loc: Iowa Dept. of Public Health, Test Facility  
Client:

November 2012, Rev 3

Printable View

Logout

**Group Session Notes**

Group Name: Tuesday PM Group      Group Type: Outpatient Group

Note Type: 2-Group Notes      Date: 12/10/2012

Billable: Yes      Start Time: 7:00 PM      End Time:

Lead Staff: Jones, Julie      Duration:      Duration Type:      Location: Office

Service: 90853-Group psychotherapy (other than multi-family group)

Co-Lead Staff:      Selected Co-Lead Staff:

Admin, Agency  
Admin, System  
Cleland, Lonnie  
Coordinator, Data

Note: Demonstrating Group Note

Cancel    Save    Finish

Attendees							Add Attendee	Mark as Present	Mark as No Show	Mark as Excused
Client Name	# Attnd	Status	Individual Note Summary	Actions	Misc. Notes	Encounter				
Address, Test	1		Test is doing well.	Review   Delete	Create	Create				

I-SMART - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://www.ia-smart.org/System.aspx

User: Schaller, Elizabeth  
Loc: Iowa Dept. of Public Health, Test Facility  
Client: Address, Test | 7809061639 | Case #: 1

November 2012, Rev 3

Generate Report    Printable View

Logout

**Encounter for Address, Test**

Encounter Type: 2-Group Notes      Event Type:

Tx ID:      Created Date:

Service: 90853-Group psychotherapy (other than multi-family group)

Program Name: 19-Test Facility/Test Facility Program : 10/28/2008 - 1/1/2009

Start Date: 12/10/2012      End Date:

Service Location: Office      Start Time: 7:00 PM      End Time:

Substance Abuse:      Duration:      # of Sessions:

Medication:

Rendering Staff: Jones, Julie      Primary Payment Src: 12-Blue Cross/Blue Shield

Supervising Staff:      Other Payment Src: 11-Client Self Pay

Referring Phys:

Cancel    Save    Finish    ➔



# Notes

## Group Notes

50. Notice that the Unsigned Notes text box is autofilled with the text you entered in both the **Individual and Group Notes** text boxes.
51. Simply proceed as you would any other encounter by adding **Goals, Objectives** and **Goal Progress** if desired.
52. **Sign Note** then click **Next** to complete the **Ancillary Services Note**.
53. Finish at the **Ancillary Services** screen will take you back to the **Group Session Profile**.
54. Notice the hyperlink under **Encounter** for our client Manual Example has changed to **View**. Clicking **View** will take you to the **Encounter Profile** screen.
55. **Finish** will return you to the **Group Session List**.

# Notes

## Group Notes

56. Notice the Group Session List now includes any group sessions you recently documented.
57. **Add** will open the **Group Session Notes** screen allowing you to create another group note. See # 39 above.

Group Session List - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://www.ia-smart.org/System.aspx

November 2012, Rev 3

User: Schaller, Elizabeth  
Loc: Iowa Dept. of Public Health, Test Facility  
Client: Address, Test | 7609061638 | Case #: 1

Printable View

MedlinePlus

Logout

Home Page  
Agency ▶  
Group List ▼  
Session List  
Group Type  
Client List ▶  
System Administration ▶  
My Settings ▶  
Reports  
Support Ticket

**Group Session List** [Add](#) [Print Group Notes](#)

Group Name	Rendering Staff	Date	Service Code	Service Description	Start Time	End Time	Actions
Tuesday PM Group	Jones, Julie	12/10/2012	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Gronstal, Jeff	3/1/2011	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Frizell, Sherry	1/4/2011	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Cleland, Lonnie	3/1/2010	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Cleland, Lonnie	3/1/2010	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Cleland, Lonnie	1/6/2010	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Schaller, Steve	9/30/2009	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Schaller, Steve	9/30/2009	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>
Tuesday PM Group	Cleland, Lonnie	10/28/2008	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		<a href="#">Review</a>   <a href="#">Delete</a>